



# ICC Direct Introduction and Training

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Noon

Thursday, September 24, 2015



**Company Confidential**

# Welcome!

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## Your Host

**Ginny Mahaney**

VP of Marketing, Infina Connect

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## Presenter

**Greg Moyer**

Vice President Products, Infina Connect

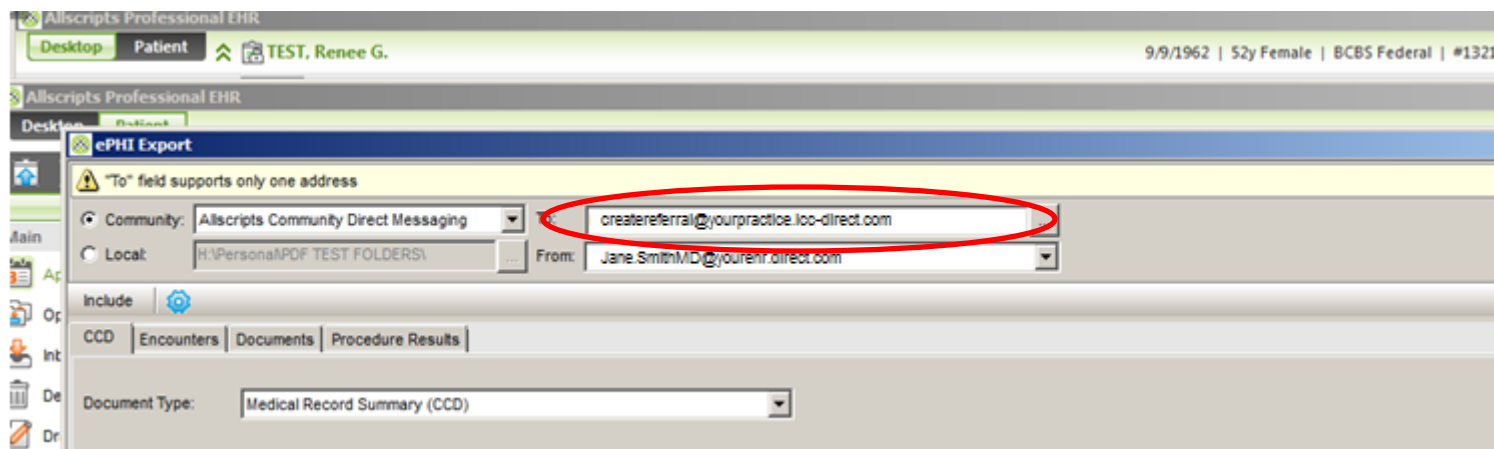
# Agenda

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- What is ICC Direct?
- Benefits of Using ICC Direct
- Overview
- Demonstration
- Provisioning ICC Direct

# What is ICC Direct?

- New capability built into ICC.
- Leverages Direct messaging to automate the creation of referrals from within any certified EHR.



- Allows providers to exchange Consolidated CDA (C-CDA) documents electronically.
- Documents are made available on the receiving side in a format that the consulting provider can easily use.
- No additional charge for using ICC Direct.

# Benefits of ICC Direct

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- Creating referrals is faster, with less manual entry and fewer entry errors
- Captures EHR updates to patient information
- Easier document exchange with your EHR
- Facilitates compliance with MU2, Core Objective 15, Measure 2 (“10%”)



# Overview

## *Direct Messaging*

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- ICC Direct uses Direct Messaging
  - The Healthcare Standard for Secure “Email”
  - Required in 2014 Edition Certified EHR Technology for compliance with Meaningful Stage 2
  
- Surescripts is our Direct Messaging service provider
  - aka, Health Information Service Provider
  - aka, HISP



# Overview

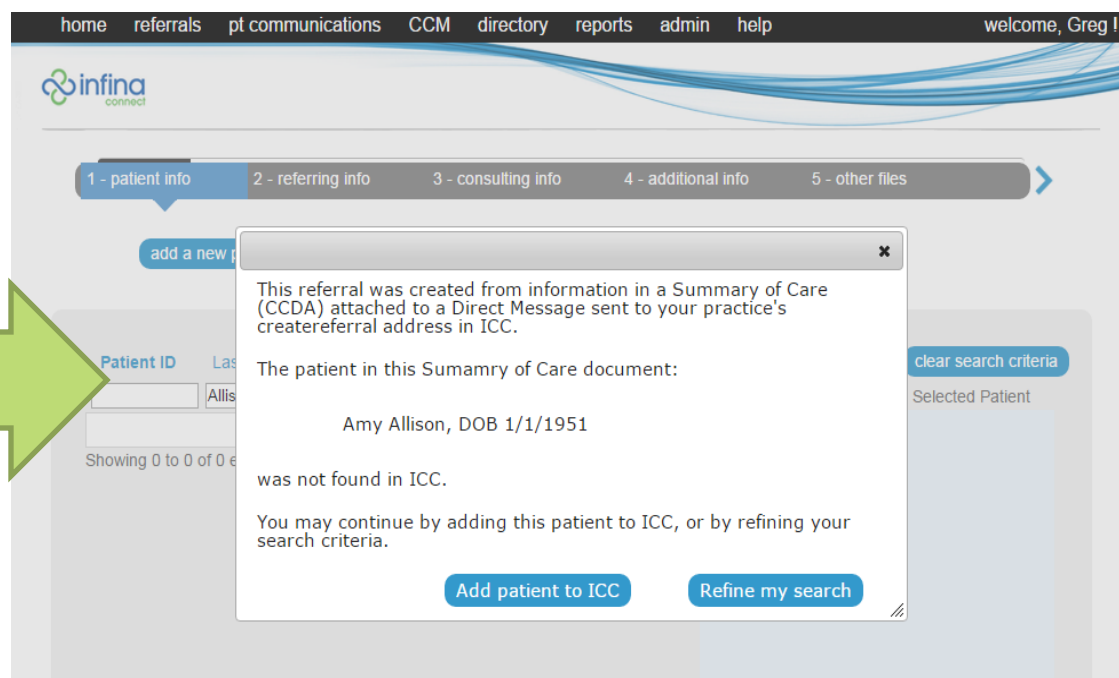
## Summary of Care (CCDA)

- ICC extracts information from a Summary of Care (CCDA) document

Amy Alice Allison, Test CCDA	
<b>Patient</b>	Amy Allison
<b>Date of birth</b>	January 1, 1951
<b>Sex</b>	Female
<b>Race</b>	White
<b>Ethnicity</b>	Not Hispanic or Latino
<b>Contact info</b>	Home phone: 111 Apple Way APT. 100 Cary, NC 27513, US Tel: +1919278-2200
<b>Patient ID#</b>	123-456-1111 2,16,849,1,11881-4,1
<b>Document ID</b>	Test CCDA 1,1,1,1,1,1,1,1,1
<b>Document created</b>	September 3, 2015, 13:30
<b>Performer</b>	Henry Prosser, MD
<b>Primary performer (primary care physician)</b>	Henry Prosser, MD
<b>Author</b>	Henry Prosser, MD
<b>Contact info</b>	1000 Centennial Way, Suite 250 Cary, NC 27513, US Tel: +1919278-2200 ext=1001
<b>Encounter ID</b>	ICCDemo-7556-474618007-02241967056
<b>Encounter Date</b>	From September 1, 2015, 14:00 to September 1, 2015, 14:36
<b>Encounter Location</b>	ICC Primary Care of
<b>Responsible party</b>	Henry Prosser, MD
<b>Contact info</b>	1000 Centennial Way, Suite 250 Cary, NC 27513, US Tel: +1919278-2200 ext=1001
<b>Personal relationship</b>	Kathleen McKeary
<b>Contact info</b>	100 Hospital Lane Springfield, VA 22153, US Tel: +1571328-0389
<b>Entered by</b>	Alysa Workman, RN
<b>Contact info</b>	1000 Centennial Way, Suite 250 Cary, NC 27513, US Tel: +1919278-2200 ext=1002
<b>Information recipient</b>	Henry Prosser, MD
<b>Legal authentication</b>	Henry Prosser, MD signed at September 1, 2015, 00:00:00
<b>Contact info</b>	1000 Centennial Way, Suite 250 Cary, NC 27513, US Tel: +1919278-2200 ext=1001
<b>Document maintained by</b>	ICC Primary Care Services
<b>Contact info</b>	1000 Centennial Way, Suite 250 Cary, NC 27513, US Tel: +1919278-2200 ext=1001

CCDA

...to create a referral



home referrals pt communications CCM directory reports admin help welcome, Greg!

1 - patient info 2 - referring info 3 - consulting info 4 - additional info 5 - other files

add a new patient

This referral was created from information in a Summary of Care (CCDA) attached to a Direct Message sent to your practice's createreferral address in ICC.

The patient in this Summary of Care document:

Amy Allison, DOB 1/1/1951

was not found in ICC.

You may continue by adding this patient to ICC, or by refining your search criteria.

clear search criteria

Selected Patient

Showing 0 to 0 of 0 entries

Add patient to ICC Refine my search

- MU2, Core Objective 15, Measure 2 (“10%”) *requires* the Summary of Care to conform to the Consolidated CDA (CCDA) standard

# Sidebar

## *Dreaded Acronyms*

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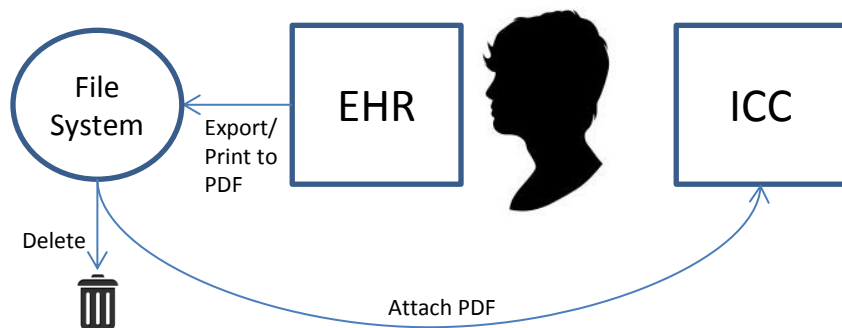
- Is a CCDA just a CCD with an “A” attached? No
- Definitions
  - CCD, Continuity of Care Document
  - CDA, Clinical Document Architecture
  - CCDA, Consolidated CDA (aka C-CDA)
- Relationships
  - A *CCD* is a type of CDA document  
Other types: Consult Note, Diagnostic Imaging Report, Referral Note, etc.
  - CCDA is an update to CDA, focused on standard templates  
Applies to 9 document types, including CCD
- For MU2, document types such as the CCD must conform to the CCDA standard



# Overview

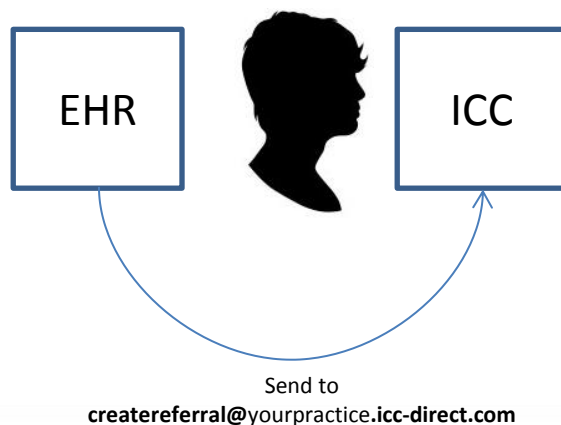
## Creating a referral in ICC

### Without ICC Direct



1. Document the referral in your EHR
2. Export or Print to PDF documentation to attach to ICC
3. Manually create the referral in ICC
4. Attach the document(s) to the ICC referral
5. Delete the exported document(s) from your file system

### With ICC Direct

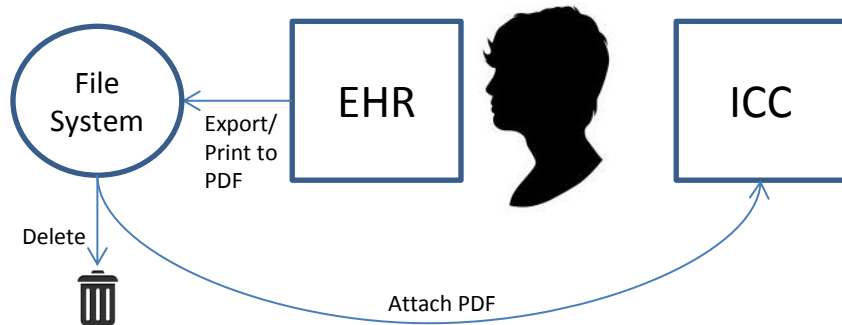


1. Document the referral in your EHR
2. Send Direct Message to ICC with Summary of Care (CCDA)
3. Review/edit the referral in ICC
  - Information is extracted from the CCDA
  - CCDA is automatically attached to the referral

# Overview

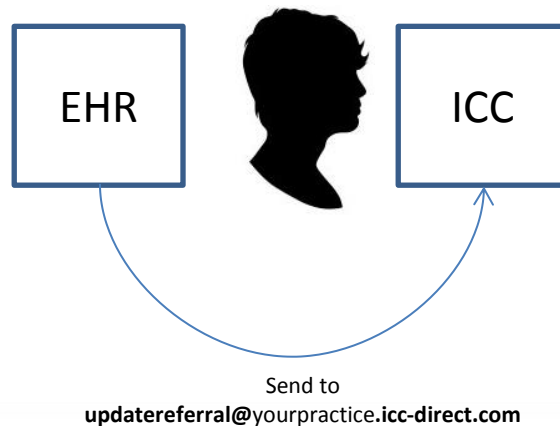
## *Updating ICC with a document from your EHR*

### *Without ICC Direct*



1. Export or Print to PDF documentation to attach to ICC
2. Attach the document(s) to the ICC referral
3. Delete the exported document(s) from your file system

### *With ICC Direct*

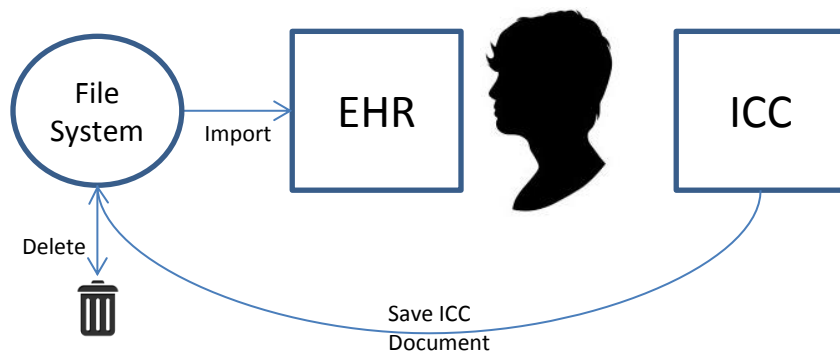


1. Send Direct Message to ICC with document(s) attached
2. Attach the document(s) to the referral

# Overview

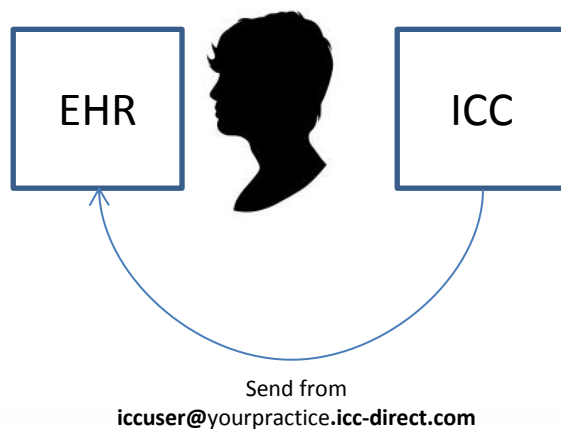
## *Updating your EHR with a document from ICC*

### *Without ICC Direct*



1. Save the ICC document(s) to your file system
2. Import the document(s) into your EHR
3. Delete the document(s) from your file system

### *With ICC Direct*



1. Send Direct Message to your EHR with document(s) attached.
2. Attach the document(s) to the patient record.

# Demo

## *Setting the Stage*

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### Character

Referring Practice  
Consulting Practice  
EHR

### Played by

Infina Primary  
Infina Consulting  
ICC

# Demo

## *Use Cases*

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### 1. Infina Primary creates a referral

Sends a Direct Message with CCDA attached  
From their EHR

To ICC: [createreferral@infinapprimary.icc-direct.com](mailto:createreferral@infinapprimary.icc-direct.com)

### 2. Infina Consulting sends the CCDA to their EHR

Sends a Direct Message with CCDA attached

From ICC: [iccuser@infinaconsulting.icc-direct.com](mailto:iccuser@infinaconsulting.icc-direct.com)

To their EHR

### 3. Infina Consulting updates the referral with a Consult Note

Sends a Direct Message with a PDF attached

From their EHR

To their EHR: [updatereferral@infinaconsulting.icc-direct.com](mailto:updatereferral@infinaconsulting.icc-direct.com)



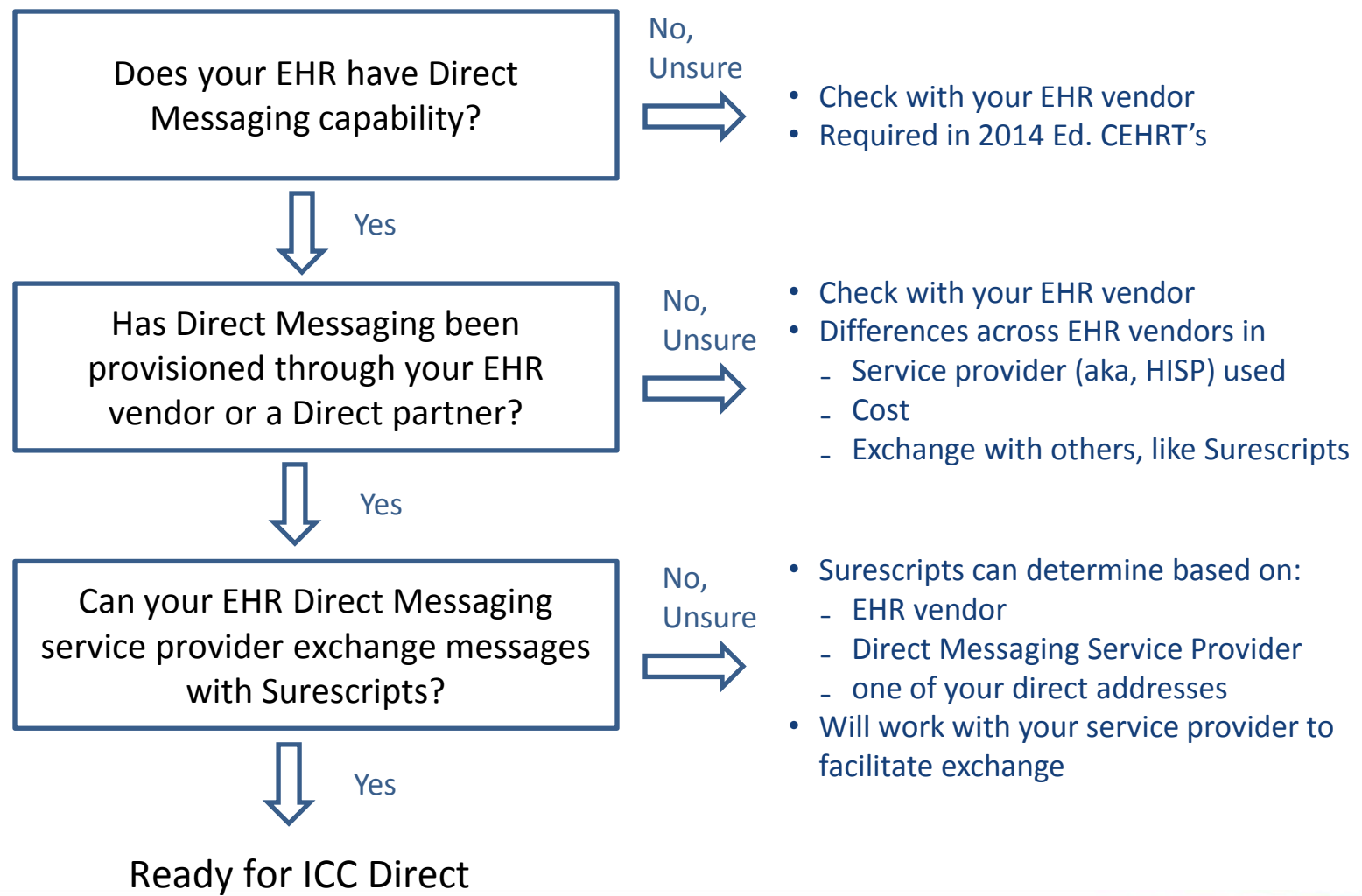
# Demo

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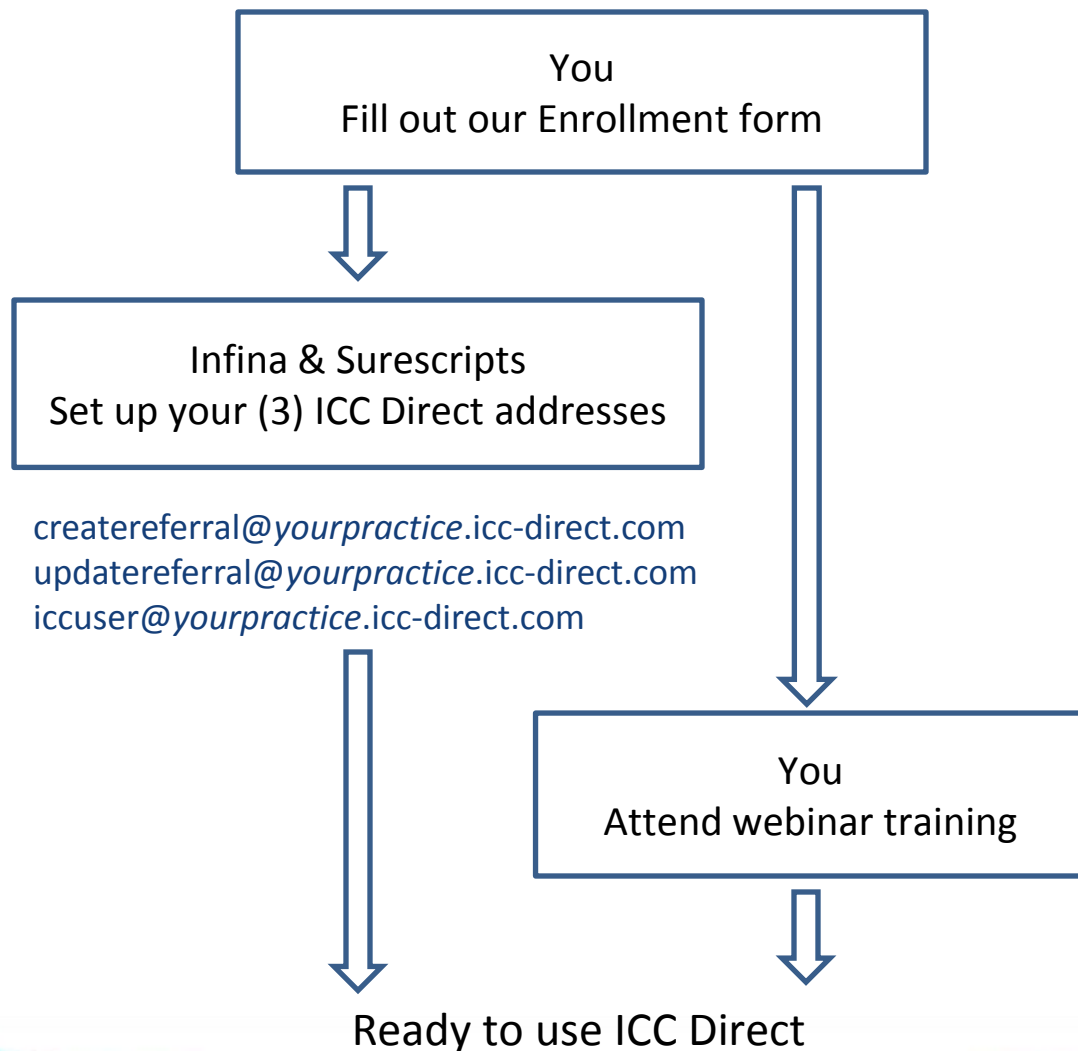
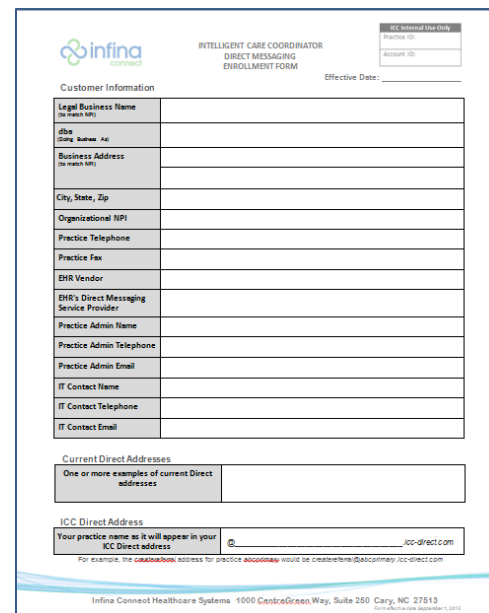


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# Provisioning ICC Direct Prerequisites



# Provisioning ICC Direct

**infina connect** INTELLIGENT CARE COORDINATOR DIRECT MESSAGING ENROLLMENT FORM

ICC Enrollment Use Only  
Practice ID: \_\_\_\_\_  
Account ID: \_\_\_\_\_  
Effective Date: \_\_\_\_\_

**Customer Information**

Legal Business Name (as shown on)	
d/b/a (if any)	
Business Address (street only)	
City, State, Zip	
Organizational NPI	
Practice Telephone	
Practice Fax	
EHR Vendor	
EHR's Direct Messaging Service Provider	
Practice Admin Name	
Practice Admin Telephone	
Practice Admin Email	
IT Contact Name	
IT Contact Telephone	
IT Contact Email	

**Current Direct Addresses**  
One or more examples of current Direct addresses

**ICC Direct Address**  
Your practice name as it will appear in your ICC Direct address @ \_\_\_\_\_ .icc-direct.com  
For example, the **contact@blue** address for practice **abc123xyz** would be **createref@abc123xyz.icc-direct.com**

Infina Connect Healthcare Systems 1000 CentreGreenWay, Suite 250 Cary, NC 27513  
Form Effective Date September 1, 2012





**Contact: Infina Support**  
[iccsupport@infinaconnect.com](mailto:iccsupport@infinaconnect.com)  
**(919) 378-2190**

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# Questions?

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